



Haynes, J., & Marshall, L. (2018). Beats and tweets: Social media in the careers of independent musicians. *New Media and Society*, 20(5), 1973-1993. <https://doi.org/10.1177/1461444817711404>

Peer reviewed version

Link to published version (if available):
[10.1177/1461444817711404](https://doi.org/10.1177/1461444817711404)

[Link to publication record in Explore Bristol Research](#)
PDF-document

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Beats and Tweets: Social Media in the Careers of Independent Musicians.

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Abstract

While mainstream accounts of the impact of internet technologies on the music industry have emphasised the crisis of the major-dominated mainstream recording industry, a more optimistic discourse has also been promoted, emphasising the opportunities that the internet creates for independent musicians. These same new technologies, it is argued, enable artists to reach new global audiences and engage with them in ways that can facilitate more stable, financially self-sustaining independent careers. Little research has been conducted, however, on the effect of new internet technologies on the careers and practices of independent musicians. This paper, part of a pilot project on the working experiences of independent musicians, examines how musicians signed to small labels in the South-west of England use social media in their careers and discusses their understanding of its benefits and disadvantages. It concludes that social media use is an essential tool in the arsenal of an independent musician, and does provide advantages for them, but significant disadvantages have also emerged and thus the benefits for independent musicians have likely been overstated.

Keywords: Music Industry, Popular Music, Social Media, Music 2.0, Disintermediation.

10113 words, including references

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Last revised 11 April 2017

Original Submission 23 January 2017

Revised version submitted 11 April 2017

Accepted for Publication 26 April 2017

*****Version accepted for publication in New Media and Society, DOI/full publication details to follow*****

Beats and Tweets: Social Media in the Careers of Independent Musicians.

The emergence of internet technologies affected the recorded music industry earlier and, to this point at least, more dramatically than the other major content industries. Due to a range of technological, economic and cultural factors, long-established patterns of popular music production and consumption were destabilised by the emergence of file-sharing mechanisms such as Napster (1999) and BitTorrent (2001), digital media players such as the Diamond Rio (1998) and the iPod (2001), and websites and social media platforms such as MP3.com (1997) and MySpace (2003). At the start of the century, for a few years at least, the fortunes of the music industry moved from the business section to the front pages. Much of the discourse centred on piracy, with the always-litigious recording industry taking out lawsuits against companies (initially) and individuals (latterly) accused of infringing the major labels' copyrights. Such nefarious acts were, it was argued, causing a dramatic decline in legitimate sales of recorded music, harming both the labels and the musicians signed to them.

The hegemonic media narrative about the music industry was thus primarily negative, dominated by the mainstream recording industry's perceptions of law-breaking, crisis and conflict. Simultaneously, however, there existed an alternative, more optimistic discourse regarding the opportunities afforded by these new technologies. These alternative accounts, often involving a certain amount of *shadenfreude* towards the travails of the major labels, saw the new technologies as an incredible boon to musicians, especially independent musicians. The wave of new innovations would, it was argued, enable musicians to promote their music, communicate with their fans directly and sell their products on the same virtual shelves as global superstars, freeing them from dependence upon labels.

Almost twenty years on from Napster, there is still some disruption in the music industry but things are considerably less volatile as new patterns of production and consumption begin to stabilise. As such, this is a timely moment to investigate whether the more optimistic visions have been realised: have the new internet technologies produced positive outcomes for independent musicians? This is particularly so given that, despite its prominence, there remains remarkably little empirical research conducted on the impact of the internet on the working lives of musicians, particularly those without celebrity status or well-established audiences.¹ Contextualised within the broader changes experienced in the music industry, this paper details how a number of independent musicians understand the role of new technologies in their careers and in the music industry more broadly. In particular it focuses on social media, which is a key element of the more optimistic discourses (e.g. Kusek 2014). Social media was/is understood as a means through which musicians can build and maintain audiences which can then be 'monetised' in a variety of ways. Our results, however, indicate a more ambiguous situation: while the musicians we interviewed recognised the necessity of social media for developing a musical career, there

¹ For example, see Potts (2012) on Amanda Palmer, and Click *et al* (2013) on Lady Gaga. Academic work on non-famous musicians is thinner on the ground, though there is discussion of relevant work later in the article.

was uncertainty about its precise benefits and criticism towards the ways in which social media has become institutionalised within the existing framework of the music industry.

‘Social media’ is, of course, a very broad term covering a wide range of related but far from identical services. Generally speaking, the term refers to ‘a host of web-based applications’ collectively forming ‘an expansive ecosystem of connective media’ whose key characteristics are social networking and the creation and exchange of content generated by users (van Dijck and Poell 2013:5) There are literally scores of social media sites/platforms that an individual musician could sign up to, including general social networking platforms such as Facebook, Twitter and LinkedIn, user-generated content sites such as YouTube and music-specific sites such as Soundcloud, Bandcamp and Songkick. Services that are not primarily ‘social media services’, such as Spotify, may also contain a significant social media element. Each of these platforms provides different functionality and offers different affordances (Hutchby 2001) and each could be the focus of their own in-depth study.² Without wanting to understate these differences, nor rejecting the potential of ethnographic approaches in understanding them, we have taken a different approach. In this paper, we offer a more institutional analysis, focusing on how the use and interpretation of social media is shaped by the relations of production within pre-existing media industries. This means that, for the purposes of this paper, we have kept the meaning of ‘social media’ necessarily open, being led both by popular discourses regarding social media in the music industry and by the understandings of the musicians in our study (further elaboration is in section 3). The approach that we are taking offers important insights into how the affordances of particular new media are shaped by the social conditions of their emergence and, while it is less common in the field of New Media Studies than studies which concentrate on the use of specific technologies/platforms, we believe that offering a macro-oriented analysis (that does not lose sight of the micro) is crucial for developing a more complete understanding of new media.

The paper consists of five sections. The next section outlines the optimistic discourse about social media and new internet technologies in more detail. After that, we outline the research project from which this paper emerges, providing an overview of the sample and explaining the central questions investigated. In the fourth section we discuss the views of the musicians interviewed and critically evaluate the everyday realities of the functions of social media for these musicians. We conclude that the benefits of social media to independent musicians are limited and that, rather than overturning existing music industry practices, these new technologies are being adapted into existing industry practices and paradigms.

How new technologies may help independent musicians: an overview

Even before the turn of the century, advanced computer hardware such as MIDI keyboards and software such as Pro-Tools had reduced the costs of production to the point where creating music of a ‘professional’ standard was within the reach of many independent

² Concerning music, Twitter in particular has been the focus of detailed case studies: see for example Bennett 2016 and Spirou 2014.

musicians. For those of the view that new online technologies would bring benefit to independent musicians, the belief was that such technologies would similarly democratise the means of promotion and the means of distribution, two capital-intensive areas in which the major labels had previously held an unassailable advantage. Combined with internet-led changes in retailing (the rise of 'long-tail' economics), the idea was that musicians would now be able to create and maintain an audience independently, providing them with a sustainable income while maintaining autonomy over their career:

Ten years ago, the only way for an independent artist to gain exposure on a large scale was to endlessly pursue, and hope for, that one-in-a-million major label recording contract. For an unestablished artist, it was pretty near impossible to find new fans for your music beyond what you could bring in doing live shows... Fast forward ten years to today [and t]he Internet has turned the recording industry upside down. Artists don't need a major label deal to find success. In fact, it's preferable *not* to have one.... the Internet has created an enormous opportunity.... Using the Internet, independent artists and bands can have literally *thousands* of people listening to their music all over the world every single day (Nevue 2003).

Broadly speaking, the central pillars of such an argument are threefold: 1) that the internet provides a global portal on which independent musicians can publicise their music and attract new fans; 2) that the internet provides a means through which musicians can keep their audiences engaged; and 3) that the internet provides a means through which independent musicians can sell their music and associated products.³ We will now elaborate briefly on each of these points.

Firstly, in providing a variety of platforms on which musicians could post music (for example, MySpace, YouTube, Soundcloud), the internet increases the number of ways in which a listener can be made aware of a musician's output. According to Collins and Young, the internet 'makes the invisible visible' (2014:101). In the pre-internet era, the ways in which a musician could get their music heard by potential fans were few – radio, television and live performance being the most obvious, but the first two were heavily restricted while the third was time-consuming, costly and accessed limited numbers of listeners. With the internet, so the story goes, a musician can post songs on sites like MySpace and YouTube and reach a much bigger audience at practically no cost. Choi offers an exemplar of this viewpoint in describing the success of Lorde who, she argues 'had difficulty getting radio airtime, [so] she put five songs on SoundCloud in 2012. The songs instantly went viral, which eventually led to the sale of millions of copies of her debut album, *Pure Heroine*' (2016:5). While this account might seem simplistic, there is no doubt that sites such as SoundCloud provide access to much bigger potential audiences than traditional channels for the vast majority of musicians, given that they offer global reach. It is widely acknowledged that internet technologies help facilitate the transnational circulation of music and can help construct diasporic identities, creating a sense of belonging at home and abroad (for

³ The numbering here is intended as logical (accessing, engaging and monetising audiences); it makes no presumptions about the chronological emergence of each 'pillar' which, in reality, are interconnected and not necessarily tied to specific technologies.

example, see Sardinha 2016). In terms of developing sustainable careers for aspirant independent musicians, however, the global reach of internet audiences can be particularly important for musicians who live away from traditional music industry centres of power such as London and Los Angeles. For example, Baym (2011:31-2) details how Swedish independent record labels are able to benefit from global access, selling the majority of their records abroad and benefitting from small tribes of followers all around the world.

Those small 'tribes' form part of the second pillar of the discourse being outlined here: that the internet (particularly social networking platforms such as Facebook, Twitter, Snapchat and Instagram) enables musicians to continually engage with fans, thus maintaining an audience willing to spend money on their products. Music fans have always demonstrated tendencies to form taste communities but the opportunities afforded by Web 2.0 and 'participatory culture' (Jenkins 2008) have amplified such processes. 'Social media', broadly conceptualised, is central to this idea, described as 'the cornerstone of [a] music career' by digital music commentator Dave Kusek (2014). While musicians' use of such services can follow a conventional one-to-many communication model (e.g. informing followers of an upcoming show), it is generally seen as more important in generating two-way interaction between artists and fans. Several authors (e.g. Bennett 2016; Potts 2012) have discussed how interaction via social media, and Twitter in particular, can be used to develop a more intense and rewarding relationship between a musician and their fans. In terms of developing a sustainable career, however, the key issue is the way in which social media supposedly enables musicians to acquire a 'direct access relationship' with their fans, creating opportunities to market to them without intermediaries (Breen 2004:80). The overall idea is that, by making oneself accessible and helping fans develop greater affinity with their work, musicians can develop a fanbase invested enough to spend money on them (e.g. Baym 2011). Though obviously reflecting a vested interest, Twitter's then-Head of Strategic Sales, Ross Hoffman, outlined the logic of this position clearly: 'the more [musicians] can build an audience on Twitter, the more tickets they can sell, the more music they can distribute and the more of their core business model they will be able to support' (in Bruno 2011).

Hoffman's statement implies the third pillar of the notion that the internet enables independent musicians to become successful: new digital technologies enable independent musicians to sell goods effectively. In the past, without support from major or moderately-sized independent record labels, musicians had minimal opportunities to access the physical distribution systems required to be sold in national and international retail networks. Opportunities for selling music and merchandise were generally limited to live performances, local networks and mail-order. With the emergence of new distributors such as CD Baby (which offers global distribution of CDs as well as digital files), TuneCore, Ditto and The Orchard, independent musicians now have the opportunity to have their music distributed to the same major retail outlets as artists signed to major labels. Furthermore, the emergence of 'direct to fan' platforms such as Bandcamp, Topspin and Big Cartel enable musicians to sell products directly for lower commissions than would be charged by major retailers like iTunes and Amazon. Given the supposed emergence of 'long tail' economics (Anderson 2007), in which retailers sell small amounts of a vast number of products, the

suggestion is that independent musicians will be able to carve out for themselves a small but sustainable niche in the digital marketplace. As Collins and Young suggest, 'the marketplace for musicians is a far more accessible place. Success in that market still requires talent, persistence and sheer luck, but at least any musician can now set up a stall in the bazaar' (2014:110).

These, then, are the key pillars of the argument that new internet technologies have been a positive development for independent musicians. The overall conclusion is that the power of traditional gatekeepers – most notably the major record labels – has been significantly weakened by the disintermediating nature of these technologies, facilitating more direct social and financial relationships between artist and fan. Such an argument perhaps peaked following the emergence of MySpace in 2003 but retains potency today. For example:

The internet has put some power back in their artist's hands. Thanks to the internet, musicians and singers now have more control over their own fates. They are able to produce their own track, upload it to the internet and promote it accordingly (Harrison 2014).

Over the past decade, more and more artists have been able to sell 100,000 or so records and fill 3,000 seat venues in 30 to 40 cities worldwide...without first being played on mainstream radio or having a large record label's marketing budget (Charles 2012).

As well as in mainstream media and online blogs, the argument is reproduced in academic accounts of the music industry. For example, Wikstrom argues that 'in the new music economy, the record label is no longer in the driver's seat; it is the artist, or the artist/manager, who is' (2009:143) while Hracs states that 'by eroding the power of the major record labels, technology is democratizing the production and distribution of music' (2012:442). Collins and Young, meanwhile, state that 'artists unable to gain the attention of the A&R folk in the major labels have at their disposal marketing and distribution mechanisms that are relatively accessible and genuinely global' (2014:101). Many success stories are offered to illustrate the viability of the new model for independent musicians: from The Arctic Monkeys going from file-sharing phenomenon to the fastest-selling debut album in British history (Hasted 2005), to Sandi Thom getting signed by Sony after webstreaming basement concerts to thousands of viewers (Sinclair 2006), to the aforementioned Lorde posting songs on SoundCloud and becoming a multi-million selling artist. Overall, these new technologies are claimed to be heralding a paradigm shift within the music (and, specifically, the recording) industry.

Investigating social media use in the contemporary music industry

The previous section has outlined a number of arguments about how new internet technologies enable independent musicians to have more direct relations with fans, greater access to the market and more opportunity for alternative online performance events requiring little to no negotiation with established gatekeepers. There are reasons to be

cautious about these claims, however, and others like them. Firstly, there is a tendency to focus on individual cases and success stories rather than more general trends, especially if the examples are relatively famous. While acknowledging that there are examples of musicians who have used the supposed new paradigm to their benefit, and have generated a sustainable living from their music, it is questionable how representative such success stories are and it needs to be asked whether they reflect the experience of the majority of musicians working today. Secondly, and relatedly, the artists who are most often held up as exemplars of leveraging the power of social media in order to develop flourishing independent careers are those who had established audiences before the emergence of these new media (Marshall 2013). Perhaps the most notable is Amanda Palmer, whose various achievements include selling \$11,000 worth of T-shirts in one evening on Twitter (Houghton 2009) and attaining pledges worth more than \$500,000 within a few days of launching a Kickstarter campaign to fund the recording of a new album (Peoples 2012). However, artists like this are able to achieve such feats because they had existing fan bases resulting from record label investment and promotional strategies earlier in their careers. As suggested by the manager of OK Go!, another act often hailed as demonstrating the power of social media for maintaining an independent career, the best way to be successful as an independent artist is to 'be on a major label for ten years first' (in Lindvall 2011). There is evidence to suggest that social media is more useful in maintaining and growing existing audiences than in building new audiences from scratch, and very few independent artists have become successful without label support (van Buskirk 2012).⁴ Finally, the stories of those artists who did seem to come out of nowhere and develop huge followings as a result of online activity are generally more complex, and more influenced by conventional music industry practices and intermediaries, than is commonly assumed. For example, the success of the Arctic Monkeys owed much to their well-established music managers and the quaintly old-fashioned strategy of relentlessly gigging in order to build up the band's fanbase; Sandi Thom was likely signed to Sony before her webstreaming success (she certainly had a significant publishing deal and employed a PR firm, and someone needed to pay the large web-hosting bill), while Lorde had been signed to the largest record label in the world for three years before 'self-releasing' her EP.

Overall, in much of the more optimistic discourse about the opportunities for independent musicians, there is a tendency to treat the theoretical possibilities afforded by the new technologies as lived reality. This leads to, at best, insufficiently nuanced accounts of music industry dynamics and, at worst, technologically determinist claims. However, these new technologies are emerging within existing social and economic frameworks which shape how they are used and developed. The small amount of empirical work that has been completed on the experience of musicians in the digital music industry (for example, Baym 2012; Sargent 2009) paints a more complex picture, with the new music economy creating disadvantages and frustrations for independent musicians, as well as opportunities. More research is needed to investigate how new internet technologies work (or don't) for the

⁴ Though what counts as 'success' in this context is obviously open to debate.

majority of working musicians, and on how these technologies are being integrated into, rather than simply overturning, existing music industry practices.

By drawing on original qualitative data from a recent pilot project⁵ this article will examine musicians' views on the impact of new internet technologies and social media platforms on the development and maintenance of their musical careers. Despite being a pilot project with a relatively small sample of data, the analytical insights obtained from examining ordinary musicians' perceptions of the role and significance of social media raises critical questions about its actual contribution to their ability to earn a living from music as it becomes more embedded within music industry structures more widely.

Research Sample and Data Collection

'Musicians' can be a diverse group, in terms of their creative practices, their revenue streams and their digital presence and, one can assume, their attitudes towards new digital technologies. All musicians have varying levels of exposure to the opportunities and risks associated with social media and internet technologies. For this project, musicians signed to record labels formed the basis of our sample, though by 'label' we mean small local entities and not global labels like Sony or large independents like XL. This target sample was chosen in order to access musicians who were not necessarily financially successful or secure in their careers but who at least had some potential for financially sustaining themselves through music. One of our principle goals was to investigate whether the dominant narratives about social media matched the reality and we sought a target sample at the crux of this phenomenon, with the potential for significant benefit (having some level of established career/audience and not completely unknown) but at risk to some of the threats (the various effects of declining record sales). We felt that musicians signed to a label and already releasing music and performing live, but who still operated on the fringes of the mainstream industry and were building a career largely through their own entrepreneurial endeavours, best met that target group.

The pilot project was made manageable by restricting the geographical focus to the South West of England.⁶ However, this sampling criterion reflected the location of the labels and not the individual musicians, who were geographically dispersed. A combination of an online scoping questionnaire with 43 musicians followed by in-depth interviews with ten respondents formed the basis of the research. The questionnaire respondents reflected some diversity across age (from 17-70, though 36 of the respondents were aged between 23 and 43) and genres (precise categorisations are impossible, but roughly a third of respondents created various forms of electronic dance music and roughly a third produced indie folk/rock; remaining respondents mainly came from a mix of folk, rock, hiphop and jazz). There were relatively few female respondents (7/43), though this is typical of popular music production more broadly. The ten musicians selected as the sub-sample were

⁵ *Digital entrepreneurs: negotiating commerce and creativity in the 'new' music industry* (funded by The British Academy small grants scheme, ref SG122392). Thanks to Ellen Kirkpatrick for research assistance on the project.

⁶ The Arts Council England's definition of the counties comprising the South West Region were used. See <http://www.artscouncil.org.uk/who-we-are/your-arts-council-area/south-west/> [last accessed 07.07.2015]

included on the basis of gender, income and genre, as well as demonstrating a range of attitudes towards social media and online engagement. Due to circumstances beyond our control, our interview sub-sample is skewed towards a mixture of indie, rock, alt-folk and lo-fi genres. However, neither the questionnaire nor the interview responses demonstrated any meaningful differentiation by genre, nor any other factor. The in-depth qualitative interviews were semi-structured and lasted approximately 45-90 minutes and were fully transcribed.

The next section draws on qualitative data from the interviews and questionnaires and examines the ways in which musicians use social media as well as their experiences and perceptions of it within the context of their career.⁷ As explained in the introduction, we used an intentionally broad definition of 'social media' throughout the research process in order to capture a sense of the various ways in which different social media platforms may be existing as part of the social relations of popular music production. To a large extent, we were led by the musicians' own understandings of what 'social media' meant and, given that none of our respondents asked for clarification on what should or should not be included, we can assume at least something of an implied consensus. Facebook and Twitter were by far the most-referenced specific services, with relatively few mentions of other social networking services such as Instagram in the interviews. Direct-to-fan platforms such as Big Cartel, and music-specific services such as ReverbNation were raised in discussion of specific points but generally did not appear to be at the forefront of the musicians' ideas of what 'social media' was.

Musicians' perspectives of the impact of social media

As part of the initial scoping questionnaire, we asked our respondents a series of questions about the impact of social media upon their careers which included attitudinal questions within a simple Likert scale as well as open questions that focused on their perceptions of the advantages and disadvantages of social media. The follow-up interviews generated more detailed information about their experiences of using social media, the role they believed it was playing in their careers and the industry more broadly.

The contextual data obtained from the questionnaire suggested that there was some ambiguity about the usefulness of social media, with acknowledgement that social media has enabled them to expand their reach (in terms of both audiences and professional networks) but more uncertainty about the bottom line impact of this expansion. This ambiguity or ambivalence was repeated in the interviews. When the topic of social media was raised, there was recognition of the role it had played in whatever level of success they had achieved:

Our band basically has been able to exist at the level we're at because of social media I would say. [15]

⁷ For the purposes of distinguishing between qualitative comment obtained from the online scoping questionnaire and from in-depth interview, data references in these sections will refer to the individual case number (e.g. [13] [23]) with 'q' appended to signify questionnaire data [13q] [23q].

I wouldn't be sat here saying I'm self-sufficient if the internet didn't exist, if social media didn't exist. It's..., yeah, it's essential. Utterly. [43]

In one sense this kind of response is unsurprising: social media now exist as part of modern social life and thus asking what role they play in an individual's career is a little like asking what role electricity plays - it's just something that is used. This is particularly the case given that our sample had minimal experience of a music industry before social media. It may not explain why a musician achieves a certain level of success but, if they have, then social media is going to have been used as part of their career.

When asked to enunciate the biggest benefit of social media for their careers, claims about disintermediation featured prominently. One musician responded that social media gave them an opportunity to 'get in contact with people without having to spend loads of money on PR and promotion' [22q] while another said that it gave him 'direct engagement with people that care about my music [and an] opportunity to cut out the ancillary services and elements of the music industry' [15q].

So, on the one hand, the musicians who were part of this study reiterated some of the dominant narratives described earlier, viewing social media as a key platform upon which they could base their careers. The most enthusiastic response stated 'I think social media has really changed the face of music... it's really levelled the playing field!' [39q]. At the same time, however, to many it is not clear exactly *how* social media helps and several, including those who spoke positively, spoke of confusion and frustration:

It's just that it's sometimes hard to know what impact it's having, y'know it's not always quantifiable. [42]

It's frustrating that you still can't sell out a gig because you know that you can easily contact enough people who would want to come but, I don't know, it's trying to put a number, a tangible effect of it is really, really confusing. [44]

In the remainder of this paper, we focus on these feelings of ambivalence, outlining where these musicians feel social media has helped them in their careers but also outlining where social media does not solve the problems it is alleged to solve, or where it creates new problems. In particular, we focus on two overarching areas. Firstly, we will discuss how these musicians feel about social media in relation to audiences, highlighting the benefits it offers in terms of audience interaction but also the frustrations generated by the difficulty in monetising this kind of activity, its ineffectiveness for reaching new audiences and the threat of marketplace saturation. Secondly, we focus on how social media is used within the musicians' industry networking practices. The musicians were generally clearer about the benefits of social media in this regard but were also strongly resistant to the ways in which social media are becoming institutionalised within conventional music industry structures.

Audiences

Within the optimistic discourse outlined earlier, a general assumption seems to be that the most transparent benefit of social media for independent musicians concerns direct contact with audiences, both the ability to expand one's audience and the ability to interact with

one's existing audience. As Baym notes, 'nearly all music professionals seem convinced that social media – *and in particular musicians' use of those media to connect with audiences* – are key to their survival' (2012:287, emphasis added). This was certainly repeated by the musicians in our study: when asked about how they used social media, engaging with audiences was generally the first thing that they mentioned and the most common type of activity, though they generally downplayed it, seemingly taking for granted that it was fairly mundane rather than a 'cornerstone of their career':

I sort of update people, if you like, rather than, y'know, actively plug[ging] my music. I just say, "I'm doing this if you're interested". [16]

I'm more just keeping people aware of what's going on, of making them aware that we've got another single, aware that there's a new video, aware that we're doing a gig, just basic stuff really. [10]

While keeping fans updated was taken for granted, several musicians stated that one of the main benefits of social media interaction with their audience was that it provided a fairly immediate way that they could receive positive feedback about their music:

It's given us a level of engagement with people that... didn't exist before, except through playing a show and standing around after. [15]

What's really nice is when it's somebody that I don't know [who] likes my Facebook page and comments and sends me a message saying, "I really like this"... and I think "I don't know who you are but that's really nice". [16]

It is clear that being a conduit for positive feedback is an important, if perhaps under-acknowledged, function of social media for musicians.⁸ In her study of more established musicians' views of social media, Baym found similar responses, stating that 'nearly all of the musicians with whom I spoke experienced personal benefits as a result of direct access that blend the rewards of friendship with those of performer/audience relationships' (2012:293). This kind of positive reinforcement can be extremely important in maintaining the musicians' morale and validating their career choices, especially in the context of the financial struggles inherent in being an independent musician:

It feels really nice to know when people are nice about stuff that you've made, and that's something you would never really see before, and actually gives you the motivation to... You can tell that the guys in the band, ... they're gonna, y'know, pitch in for a few quid for the next rehearsal, they're gonna go "oh, okay, I'll take my last holiday [from my job] so we can go and do that tour, even though I'm gonna have a fight with my girlfriend about it." [15]

Nonetheless, despite the positive role that social media can play in maintaining morale, the musicians in our study were generally sceptical towards other perceived benefits of social media in relation to audiences. Two specific criticisms arose. Firstly, there was a general

⁸ It should be noted that some musicians also highlighted the need to develop a thick skin to deal with the flow of criticism!

view that it was difficult, perhaps impossible, to transform social media interaction with fans into financial income:

I think nowadays, with how people consume music, money maybe isn't the best indicator because you have free services that people use, like YouTube, Spotify and things like that where you can have a huge amount of appreciation coming your way but it doesn't actually materialise into any kind of money. [7]

As Baym (2012) discusses, musicians' social media interactions with audiences straddle boundaries between fandom and friendship. However, while the interactions that are more like friendship may be emotionally rewarding for musicians, friendship relations are less easily commodifiable than more market-based fan/audience relationships. As such, it is unclear that social media interaction can be monetised in the simplistic way depicted by Hoffman earlier in the paper. There is no necessary correlation between social media 'success' and real-world financial sustainability:

Sometimes you can have an event ... and the Facebook attendance might be through the roof because the whole viral thing's took hold and loads of people have gone 'ah, yeah' and the sort of halo of liking expanded outwards but then the sort of door receipts can be abysmal for that event. So, it is frustrating. [8]

Given that 'support in the virtual realm may not be as concrete as support in the physical dimension' (Suhr 2012:113), traditional income streams (sales of tickets, music and merchandise) remain the building blocks of an independent musicians' income. As such, while local and physical audiences may be far smaller than potential online audiences, many of our musicians viewed them as much more important for sustaining a musical career:

The best form of promotion is touring. That is how we increase our fanbase. [44q]

Although discovery potential exists, actual online discovery is *very* low. Online fans are diffuse and hard to reach physically, e.g. with gigs. Real-life fanbase[s] in geographic localities (Brighton, London, Southampton) have much more value to my revenue and are easier to sell to/reach. [8q]

These comments connect to a further criticism of social media that was very prominent in our sample. Whereas conventional wisdom holds that social media enables musicians to reach new audiences, the musicians in this project were dubious of this claim. The general view was that, whereas social media can enable one to connect with existing audiences, it does not help in developing new ones:

I see our Facebook page, the likes creep up, it's tiny. The amount of time we've spent trying to get more likes and we just reach the same people, you know. [23]

I feel like the people that I reach through social media are my friends anyway, or family, or friends of friends which is great but it's not my aim, my aim is to reach people that haven't heard of me before, new people,..., I've had a lot more luck with playing lots of gigs, getting people to sign up to my mailing list and keeping in touch that way than I've had through social media. [7]

In his study of independent musicians in two US music scenes, Sargent found similar experiences and perspectives. The musicians in his study also viewed 'cultivation of support in their local music scene as foundational' to their careers but 'despite the promise of ICTs to transform musicians' access to new audiences, musicians were consistently frustrated by their inability to reach beyond their existing social networks' (2009:476,474). In our study, the difficulty in accessing new audiences was connected to the widely-held view that the online music field was 'over-saturated' (a word repeated many times in the questionnaires and the interviews). There is simply so much music available online that it is extremely difficult to attract recognition:

Suddenly everyone has a band, or is promoting their DJ night, or radio show or something or other, and it more or less seems like shouting in to a void of people talking about themselves, and I'm just one more of them...We've become pests. [21q]

A drop of water in the ocean is difficult to spot! [2q]

It is not hard to find evidence to explain why musicians might feel this way. Streaming services such as Spotify offer catalogues of over thirty million tracks while SoundCloud users upload approximately twelve hours of music every minute (Walker 2015). Such an abundance of music, however, means that the vast majority of it does not sell, or even get heard. Arguing against long-tail economics, Elberse (2013:159-162) reports that, of the eight million digital tracks to sell at least one copy in the USA in 2011, 94% sold fewer than 100 copies, 74% sold fewer than ten copies and 32% sold just a single copy.⁹

The popular music industry has always been characterised by an over-supply of aspirant musicians. However, the increased accessibility of the means of production, distribution and promotion enables more musicians to feel that they are 'in the game' than ever before, while the discourses about becoming successful independently mean that they feel they have a chance of finding a golden ticket. In the absence of more traditional forms of success (like income), the drip-feeding of positive feedback through social media channels encourages musicians to persist. The result is that the boundaries between 'amateur', 'semi-professional' and 'professional' musician – which have always been blurred when it comes to musical production (Frith *et al* 2013: 66-68) – have become even more complex and the over-supply of aspirant popular musicians has been dramatically intensified, making it even harder to achieve a sustainable level of recognition or success:

You are now competing with thousands and thousands and thousands of people, millions of people, where you used to be competing with the people in your town, or the people that sort of were willing to do the foot work to get to a certain level. [15]

Overall, although the musicians in our study routinely used social media for engaging with their existing audience, and valued the appreciation that they received through it, they were

⁹ These numbers are partial, as some digital distributors (e.g. TuneCore) do not report sales figures to Nielsen SoundScan, which records sales figures in the USA (though some, such as CD Baby and Bandcamp, do). That means that the overall amount of music released will be much higher. It is unlikely that the proportion of releases selling more than a handful of copies would increase with the inclusion of these additional releases.

far more sceptical to any claims that it helped them to realise income or to expand the size of their audience.

Industry

The musicians in this study were far more positive about the ways in which social media enabled them to connect to others working in the industry, including other musicians. Indeed, it seemed to us as if social media has virtually replaced the telephone as the primary form of communication within the music industry. Comments such as these were typical:

I can definitely think of all kinds of occasions where, you know, gig requests or collaboration requests or, you know, what have you have come about over social media. In fact, I can't really remember the last time I got asked to do a gig over email now... it's all, you know, promoters or kids that are putting a show on and they definitely prefer to contact you over Facebook or Twitter. [8]

It's just easy, if you're doing a gig with someone, another band, and you've got to share a drum kit or something, they can just give you a quick message over on the Facebook and then you end up having a chat. [10]

More important than these routine utilisations, however, many of the musicians discussed the ways in which social media helped them increase their social capital. Like many working in creative industries, independent musicians survive on very little economic capital and have to rely on favours from those in their social networks, often from other freelance creative workers who are themselves looking for ways to circulate their work and develop their reputation. In many ways, these practices are very similar to what has always occurred, but social media facilitates greater circulation of this 'economy of favours'. The quote below illustrates a situation in which, through social media, a musician was able to leverage the good will of his engaged audience (and/or potential self-interest from freelance creatives):

So, we've done [long pause], er, only because we have no money, we've often been like "hey, are any of you illustrators, graphic artists? Would you like to help us design artwork, or t-shirts or stuff like that?"... After 11 years in a band you've probably used everyone – you've used most of the favours you're going to get from your friends and family. So, through social media you can very quickly get all sorts of people back in, you can kind of motivate your audience if you like, to participate which is beneficial, y'know. You make friends with these people and they are willing to help you out more and they bring their friend.... [15]

As well as using social media to enable the exchange of free labour, many of the musicians we interviewed focused upon social media's ability to increase their social capital by gaining access to intermediaries (including more established musicians) who would otherwise have been difficult to contact. For example, one musician found out who had reviewed recordings by a similar artist, and 'got in touch with them and said "Can you review my CD?" and then I've had a few radio plays' [16]. Another mentioned the importance of being followed or retweeted by a musician with a higher profile than them. Generally, the musicians were quite strategic in this use of social media:

If you asked me would I rather have two thousand followers or ten influential people that are very likely to retweet a release announcement then, for me, that's a no-brainer. [8]

I've kind of given up on the fanbase thing... but I find it really important for networking. Like Twitter, for example, I think is amazing – if you want to contact someone or get someone's attention, you can tweet them and they will probably see it no matter what their status is, which is amazing. [7]

Given the over-saturation discussed above, it is questionable whether those influential people being targeted are receiving the message being sent. Nonetheless, it is important to recognise that, where the musicians were most positive about the opportunities afforded by social media, it tended to be connected to their opportunities to network and enhance their social capital.

However, the musicians were critical of the ways in which social media is becoming institutionalised within existing industry patterns. Firstly, they raised concerns about the way that social media metrics are becoming established as mechanisms for providing legitimisation within the music industry. The number of followers a musician has, or their online chart popularity are, perhaps unsurprisingly, being used as a proxy for market potential. This can be at a very local level, with promoters looking at Facebook likes and YouTube hits before deciding to book a band, or it can be at a much higher level: at the time we were conducting the interviews there was a national newspaper story in the UK about the use of social media metrics in Radio 1 playlisting meetings (Khomami 2014). This was mentioned to us during several interviews. There was clearly a perception among our musicians that industry figures make decisions based purely on numbers rather than listening to music, with one describing it as 'the biggest downside of the industry' [10] and another complaining 'the whole industry is meant to be based on music but it's based on hype' [18q]. Even those who have benefitted from their online presence were deterred by what they interpreted as mistaken priorities:

I have been in meetings where people go "Oh, well you have this number of followers, so that's good, that's why we're meeting with you" which is... [pause] crushing. [15]

Of course, musicians have always complained that 'the industry' has cloth ears, screwed-up priorities and doesn't actually listen to 'the music'. This is simply the most recent incarnation of the phenomenon. It does, however, illustrate how social media is fitting into well-established music industry practices and beliefs rather than transforming them.

The second way in which the contemporary situation reproduces existing practices in the music industry can be seen in the continued importance of gatekeepers. While the internet may offer 'free' promotion to independent musicians, many musicians in our study thought that recognition from traditional music industry gatekeepers remained essential if one was going to be taken seriously

It doesn't look good for someone to be shouting their own corner... [radio] pluggers, radio producers, journalists, all those kinds of people they will see something... essentially like a, what used to be called an unsolicited demo or whatever – they see

something that's come from the artist themselves asking for something, asking for radio play, asking for a review and it doesn't look good, it doesn't reflect on you well. [23]

I might only have 100 followers but, I'm signed to Columbia, they'll go "well if those guys are willing to take a punt on you, then [I'll give you a support slot]" because there's an element of the music industry still looking out for its own, y'know, and you definitely don't get the breaks if you go down the independent path. [15]

This musician's belief that 'if you reject the music industry then they'll be quite happy to just ignore you' is demonstrated by a study of Dutch A&R representatives (Zwaan and Bogt 2009) which found that despite (or perhaps because of) the amount of routes to new music, the reps still relied on their professional networks when making judgements about who to sign. 'Essentially, other music industry professionals within the A&R manager's network legitimize the quality of both artist and music.... Musicians with connections to this network have a better chance of becoming successful professionals' (Ibid:98). Sargent reaches similar conclusions: 'without connections to record labels and other more formal music industry institutions, local-level musicians encounter significant limits' (2009:484).

The emergence of social media has thus not generated the levels of disintermediation in the music industry as sometimes assumed. More than this, however, powerful new mediators have emerged. Because of over-saturation and the overwhelming amount of information available to audiences, internet media is becoming increasingly consolidated and a handful of the most successful sites are establishing themselves as new gatekeepers and tastemakers within the digital music field. These new gatekeepers complement rather than replace existing gatekeepers and, in many cases, intertwine with them. For example, while the emergence of MySpace was extremely significant for accelerating the notion that musicians could build their careers independently, it also worked closely with well-established media entities such as MTV (Suhr 2009:192). The end result is that the online music field adopts many of the conventions as the pre-internet music industry:

The digital field is also increasingly turning into a pre-configured field, where it has become easy for the music industry associates to discern, categorize, and prioritize the artists of various standings. It has become difficult to build one's professional music career without being part of the digital field of cultural production, and having such an affiliation essentially implies that one cannot truly escape from the mainstream industry's presence in the digital field (Suhr 2012:115).

It can thus be argued that, in an over-saturated environment, access to music industry expert networks and influential gatekeepers has become more important rather than less. This is a vital point as it brings into sharp relief the economic factors at stake. For the musicians we interviewed, one of the most pointed issues was that the new gatekeepers were leveraging their power and charging for things that were once free. So, for example, Facebook charges musicians for a post to be sent to more than a certain number of followers, meaning that it is 'very difficult to reach as many people as before without paying

for advertising/promotion' [22q]. On a practical level, this limits the effectiveness of specific forms of social media:

Facebook is horrible for promoting things because they've limited the amount of people you can reach now anyway. So, if I post something, I've got like eight thousand something followers, but I can reach about eight hundred of them through posts... so for me it's really ineffective to communicate because no-one actually really sees it. [7]

More importantly, it also means that the most influential forms of social media now require musicians to have a level of economic capital in order to use them effectively which, generally speaking, they don't have:

There's another website that I use called Reverbnation and..., but again that's all quite money-based which is quite a shame. They're constantly offering you updates, they're constantly saying "You're top!" or "Come and do this, come and do this" which is very tempting, but it would cost money. [16]

As one questionnaire respondent wrote, 'social media offers a chance to promote yourself, *in theory*, for free' [18q, emphasis added]. A fundamental assumption of the popular narrative concerning the democratising effects of social media is that such resources are freely available to all musicians. The internet, and social media, have become so naturalised that they are assumed to be 'just there', much like our voices are 'just there', able to be used freely at any time. However, the internet is not a neutral space, it is driven by commercial concerns and, without financial support to pay for 'boosted posts' and 'promoted tweets', the opportunities for independent musicians remain limited.¹⁰ Several musicians argued that being successful on social media (and in the new music industry more broadly) still depended on 'the old model' of significant financial support, most likely from a record label:

...Unless you're using the old model, the old industry model, which is paying money to promote your band, paying to get on radio, paying for advertising - that's how The Killer's get fifty million likes on Facebook, because they're a big group because they've got money behind them. [23]

Contrary to the popular narrative, social media services are *not* decommoditised spaces challenging existing commercial music structures. Rather, they are commercial spaces in their own right, which intertwine with pre-existing commercial structures.

Conclusion

¹⁰ Some of the musicians were reacting against the monetisation of social media and reverting to what we might call 'old school new media', doing much of their promotion via email lists, which they felt were more personalised and had more opportunity to lead to direct sales. This reinforces Marwick and boyd's analysis that, while it is 'virtually impossible for Twitter users to account for their potential audience', email is a 'directed technology' where messages are 'pushed' to an articulated audience that can receive content directly targeted to them (2010: 117-20). However, alongside the medium's technological affordances, there was also an ideological dimension to the musicians' strategies, with the switch to email seen in some ways as a rejection of the industrialised system of social media. As one said 'it's sort of nicer to take, wrestle back control of that. I like how personal a mailing list is... if you can have a mailing list that's not kind of corporate thing' [15].

While celebratory discourses about the liberatory power of new internet technologies for independent musicians are still commonplace (for example, Charles 2012), we believe that the evidence put forward in this paper gives reason to question some of its core assumptions. In particular, we would highlight the following four issues:

- *Independent musicians are at the sharp end of the 'crisis of the music industry' and online success does not easily translate into material sustainability*

Independent musicians rely heavily on income derived from selling music and tickets to physical audiences, which have been undermined by the 'crisis of value' affecting the music industry in the internet age; long-tail economics has not materialised in any meaningful way for most in the tail, and the tail is getting bigger; it is hard for artists to monetise social media activity, with traditional means of accessing/developing audiences more effective in generating the income needed to survive.

- *Social media is more effective for maintaining established audiences than building new ones*
- The most common success stories used to demonstrate the potential of social media are acts who already had significant audiences. For such artists, the new technologies do provide more opportunities than existed in the past to leverage their following and thrive independently. However, that is very different from an unknown act trying to build an audience from scratch, given...

- *Invisible visibility*

While the internet may be able to 'make the invisible visible', in reality it is a form of invisible visibility. The online music market has become 'over-saturated' as more and more acts release music online. Musicians thus clamour for attention alongside millions of others with little to distinguish them in the online sphere. Getting attention in the global marketplace is thus very challenging.

- *Traditional gatekeepers remain vital, and important new ones have emerged*

Because of over-saturation, financial capital is needed in order to access effective promotion, but it is thin on the ground; support/sponsorship from music industry gatekeepers is necessary to move up to the next level, not merely because of money but also because it provides a form of validation which is recognised by other gatekeepers. Disintermediation has been exaggerated.

Overall, we would question claims that these new technologies have fundamentally transformed the organisation of music industry practices. The utopian claims about the opportunities afforded by the new technologies may not be wholly untruthful – there are many examples of musicians able to nurture financially self-sustaining careers in the online music field – but, as in the past, the successful musicians are a small minority and not representative of the experience of independent musicians more generally. The musicians' views outlined above describe some of the limits to the new opportunities and reveal the ways in which old narratives are being reproduced within the new narratives. The emergence of social media and other internet technologies may have intensified many elements of an independent musical career – both good *and* bad – but it has not substantially modified many of the basic principles. What we are witnessing is new media *fitting into existing social relations of musical production*, not fundamentally overturning them. As

Jones states, 'neither "the Music Industry", nor music industry have gone away; whatever the impact on musicians of digital instruments and social networking, the paths to market still lie through musical-industrial practices' (2014:58).

It should be repeated that this paper is based on a pilot project with a relatively small sample of musicians. Further research would be needed to fully substantiate the themes being outlined here, and is needed on the digital working practices of musicians more generally. In particular, it needs to be more fully investigated whether practices and attitudes are consistent across genres. Detailed case studies of musicians who have created new audiences and sustainable careers (rather than simply enhancing existing careers) on the back of these new technologies would also be valuable, in order to interrogate the wider applicability of the strategies used and their implications for both understandings of social media and the music industry more broadly. Finally, more detailed analysis of specific technologies/platforms could also be valuable to learn which are having the most pronounced impact on musicians' practices. Different technologies generate different affordances, and it may be that the social media platforms most used by the musicians in our sample are not the ones with the greatest potential for supporting sustainable musical careers.

That said, analyses of specific examples – both of musicians and of technologies/platforms – always need to be framed by awareness of the institutional structure of the music industry and the ways in which these institutions shape the daily practices of working musicians. Looking at the broader patterns of success and failure within the music industry, we do not see a reason to think that the issues outlined here would be undermined by additional research. Whatever the opportunities and affordances offered by new technologies such as social networking sites and direct to fan platforms, transforming the basic structure of the music industry does not seem to be one of them.

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